Sourcing Instructions for Suppliers: Reviewing and Responding to Negotiations

Last Updated: 4-Jun-18
Table of Contents

1 Reviewing Negotiations .............................................................................................................1
  1.1 Reviewing the Header ........................................................................................................1
  1.2 Reviewing the Lines ........................................................................................................2
  1.3 Reviewing the Controls ....................................................................................................2
  1.4 Reviewing the Contract Terms .........................................................................................3
2 Responding to Negotiations ..................................................................................................3
  2.1 Acknowledging Participation ..........................................................................................3
  2.2 Creating a Quote – Header ............................................................................................4
  2.2.1 Uploading Attachments ............................................................................................5
  2.3 Creating a Quote – Lines ...............................................................................................6
  2.4 Acknowledging Amendments .......................................................................................9
  2.5 Accessing Draft Responses ...........................................................................................10
3 Additional Functionality .........................................................................................................11
  3.1 Online Discussions .......................................................................................................11
  3.2 Quote by Spreadsheet ..................................................................................................12
4 Support ....................................................................................................................................14
Sourcing Instructions for Suppliers: Reviewing and Responding to Negotiations

1 Reviewing Negotiations

Please follow the instruction in the PDF document “Sourcing Instructions for Suppliers – Accessing Negotiations”. Once you are in the negotiation, you may explore the various sections. If you have any questions about these sections, please reach out to the Buyer directly. When reviewing the negotiation, pay special attention to the following:

1.1 Reviewing the Header

1. **Terms** section identifies the terms for the negotiation. If you have any questions on the negotiation terms, please reach out to your Bechtel buyer

   Terms
   
   | Bill To Address | US_AZ_GLENDALE_85305-2201 |
   | Ship To Address  | Bechtel          |
   | Delivery Terms   | Delivered Duty Paid - DDP |
   | Payment Terms    | NET 30 |
   | Carrier          |                |
   | Freight Terms    |                |

2. **Currency** section identifies all acceptable currencies for the event. Additional response currencies may be added by the Buyer.

   Currency
   
   | Auction Currency | USD |
   | Price Precision  | 2   |

3. **Requirements** are any preconditions or qualifications to supplement the bid. Bechtel may additionally require you to provide targeted information specific to the scope of work.

   Requirements
   
<table>
<thead>
<tr>
<th>Details Section</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commercial</td>
</tr>
<tr>
<td>Technical</td>
</tr>
</tbody>
</table>

   Note: Click Show All Details to expand all requirement questions

4. **Notes and Attachments** includes any notes the buyer wants to relay about the negotiation as well attached files containing the Scope of Work, Terms & Conditions, and other Contract Terms. To open an attachment, simply click the attachment title.

   Notes and Attachments
   
   - **Title**: Attachment 1
   - **Type**: File
   - **Description**: T&Cs
   - **Category**: To Supplier
   - **Last Updated By**: 07-Jun-2018
   - **Usage**: One-Time

   Note: Please ensure that you download all attachments if you intend to bid.
1.2 Reviewing the Lines

This contains the Products needed for the Project and includes Description, Unit of Measure, Target Quantity, Promised date, etc. per line item.

<table>
<thead>
<tr>
<th>RFQ: 109708</th>
<th>2 Unread Messages</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Title</strong></td>
<td><strong>Status</strong></td>
</tr>
<tr>
<td><strong>Time Left</strong></td>
<td></td>
</tr>
</tbody>
</table>

**Lines**

<table>
<thead>
<tr>
<th>Display Rank As</th>
<th>Line</th>
<th>Item, Rev Category</th>
<th>Unit</th>
<th>Quantity</th>
<th>Need By From</th>
<th>Need By To</th>
<th>Best Price (USD)</th>
<th>Active Responses</th>
<th>Time Left</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.2.3</td>
<td></td>
<td>USD3</td>
<td>EACH</td>
<td>15</td>
<td>17-Nov-2017 11:05:33</td>
<td>17-Nov-2017 11:05:33</td>
<td>Blind</td>
<td>Blind</td>
<td>0 seconds</td>
</tr>
</tbody>
</table>

1.3 Reviewing the Controls

Controls are Response Rules set by the Buyer. If you have any questions regarding controls, please contact the Buyer directly.

**Response Rules**

- Negotiation is restricted to invited suppliers
- Suppliers are allowed to respond to selected lines
- Suppliers are required to respond with full quantity on each line
- Suppliers are allowed to provide multiple responses
- Allow Quote Withdrawal
- Buyer may close the negotiation before the Close Date
- Buyer may manually extend the negotiation while it is open
- Allow Alternate Lines on Supplier Responses
- Allow Staggered Awarding
1.4 Reviewing the Contract Terms

The Contract Terms section is where all the deliverables for the negotiation will reside. Any questions regarding the contract terms should be directed to your Bechtel buyer.

2 Responding to Negotiations

After you receive an invitation to participate in a negotiation, you can acknowledge your participation and create a quote. Follow the instruction below to acknowledge participation and create a quote.

2.1 Acknowledging Participation

1. Review the negotiation, and select **Acknowledge Participation** from the actions menu. Then click **Go**.

2. Upon reviewing the negotiation, please acknowledge participation by picking **Acknowledge Participation** next to **Actions** and click **Go**. This will then bring you to a new page where you will decide if you company will participate in the negotiation by clicking **Yes** or **No** (shown below):

   a. **Yes - Accept**. If accepted, you may participate in the negotiation.
   b. **No - Decline**. If declined, you will not be included in additional communications about this specific event in the future, and is not expected to participate in the negotiation. If you respond no on accident, please contact the buyer for the next steps.

3. After choosing your response to the invitation, click **Apply**.
**Note:** If you respond “no” your Bechtel buyer may remove your company from the negotiation. If you respond “no” by mistake, please contact your Bechtel buyer for assistance.

### 2.2 Creating a Quote – Header

1. First, ensure you have reviewed the negotiation in full, including downloading all the header level Attachments.

2. To create a response, click **Create Response/Quote/Bid** under the **Actions** drop down menu then click **Go**.
3. When creating a quote, you will first land on the **Header**. On the header of the create quote page you can add any notes to the buyer, select the quote currency, and upload attachments.

![Create Quote: 492139 (RFQ 109708)](image)

### 2.2.1. Uploading Attachments

1. To add attachments, Click the **Add Attachments** button.

![Create Quote: 492139 (RFQ 109708) - Attachments](image)

2. This will redirect you to a new page. Add a title and description then browse your computer and select the appropriate file. You can also insert a URL, short text, and long text attachment. On the top right corner, click **Apply** to attach the file or **Add Another** to attach the file and attach another.
3. You will see a confirmation at the top of your screen

![Confirmation]

Test attachment has been added successfully.

Create Quote: 492139 (RFQ 109708)

2.3 Creating a Quote – Lines

1. Click on the Lines tab to input your quote/pricing information.

Create Quote: 492139 (RFQ 109708)

2. Populate the available fields including Quote Price and Promised Date

Level 4 - Public
Note: The Promised Date field may default to the date the buyer has entered. You may edit and/or delete this date. The Promised Date is not a mandatory field.

3. If you wish to provide more detail for a line, you can upload line level Attachments or any Notes to Buyer. To do this, click the update button. Enter all of the necessary information, and then click Apply.
4. When satisfied with your bid, click **Continue**.

5. You will then be prompted to **Review** your quote, then either **Submit** or **Save Draft** to submit your quote at a later time.

6. A confirmation window will appear after clicking **Submit**.
2.4 Acknowledging Amendments

If the Buyer has created an amendment to an existing negotiation, you will be notified. Once you open the amended negotiation, you must acknowledge the amendments to prove that you have reviewed and understand the changes that have been made. When creating a new amendment, the negotiation number rev up, indicated by a comma and the amendment number (EX: RFQ 112461 becomes 112461,1).

1. Open the amended RFQ by clicking on the Negotiation Number. Upon doing so, you will receive a warning message. Click Yes to proceed

2. You will be brought to a screen where you must Acknowledge the amendment that has been made. Review the changes and check the checkbox to confirm, then click Acknowledge

3. After clicking Acknowledge you will receive a confirmation message. Click Yes to create a quote

4. If you selected yes, the amended negotiation will open and you will have the ability to enter a new quote. Follow the same steps you took to create the original quote, as seen in section 3.2 and 3.3

Note: If you created a quote for the original negotiation, your quote will be pre-populated. You can submit the quote as is, or make changes before submitting.
2.5 Accessing Draft Responses

1. Access the Sourcing Home Page through the menu icon, located in the left corner of the page.

![Sourcing Home Page]

2. Under the Quick Links section, look for the Manage section, the click Drafts.

![Quick Links]

Note: Alternatively, you can click Full List below “Your Active and Draft Responses” to see all responses that have not yet been awarded, rejected, or disqualified.

3. Selecting Drafts, will take you to the search below. It is recommended that you search for your draft response using your Negotiation Number.

![Manage Draft Responses]

Note: Your company’s Negotiation Number, or RFQ number, can be found in an email you should have received from “Oracle R12 Development Workflow Mailer” with the subject beginning with “FYI: Open for quoting: RFQ”. If you cannot find this email, ask your Bechtel buyer for the negotiation number.
3 Additional Functionality

3.1 Online Discussions

To communicate with the Buyer within a specific negotiation, you can use the Online Discussions tool. The format is similar to email, but is directly connected to the negotiation. Follow the direction below to create a new online discussion message:

1. Open the negotiation, go to the Actions drop down menu and click Online Discussions, then Go.

2. Click New Message to start a new message.

3. Enter a Subject and Message and any Attachments (optional). Then click Send to send the online message to the Buyer.
3.2 Quote by Spreadsheet

**Quote by Spreadsheet** functionality allows you to create a quote by uploading an excel document. You will begin by exporting a file then modifying it and subsequently uploading it back into the system. Quote by Spreadsheet is most commonly used when creating a quote with hundreds or thousands of line items.

1. Open the negotiation and click **Create Quote** under the **Actions** drop down menu then click **Go**.

2. Click **Quote by Spreadsheet** to begin.

3. First you must export the spreadsheet. To do this, select the desired format and click **Export**.
4. The Excel file will download onto your computer. Open the file in Excel, enter your quote and any other necessary information, then **Save** the Excel spreadsheet. The yellow cells are mandatory fields and the green cells are optional.

   ![Excel screenshot]

   **Note:** When downloading the Excel spreadsheet, a zip file will be created. This zip file contains the exported spreadsheet as well as a help document. If you have any trouble using quote by spreadsheet, open the “RFQ-Quote-Help.htm” document that was downloaded onto your computer.

5. Go back to the iSupplier Portal, click **Browse** and select the saved excel file. Then click **Import**.

   ![Excel screenshot]

6. Confirm that the information was uploaded into the negotiations correctly and click **Continue**.
7. Review your quote one last time to confirm that you provided all of the necessary information and it is accurate. Once ready, click **Submit** or **Save Draft**.

4 **Support**

If you have questions or need more information on a specific negotiation, please reach out to your Bechtel Buyer.

For navigation help and technical support email the Procurement Helpdesk at [procweb@bechtel.com](mailto:procweb@bechtel.com).

All login issues should be directed to the IS&T Service Center at [istsc@Bechtel.com](mailto:istsc@Bechtel.com).